



State of California

Employment Training Panel

Arnold Schwarzenegger, Governor

June 2, 2009

Debbie Ludwig, Finance/Office Manager
Budlong & Associates, Inc.
5151 Verdugo Way, Suite 201
Camarillo, CA 93012

- Dear Ms. Ludwig:

RE: FINAL MONITORING VISIT REPORT for Budlong & Associates, Inc. – ET08-0442

Date of Contact:	5/20/09 & 5/29/09
Beginning/Ending Time:	10:00 a.m. – 10:30 a.m.
Date of Last Visit:	4/17/08
Visit Location:	Camarillo
Contact Person(s)	Debbie Ludwig, Finance/Office Manager Gilberto Pelaez, ETP Analyst
Action Required:	No

CONTRACT INFORMATION:

Term of Agreement:	4/07/08 – 4/06/09	Agreement Amount:	\$15,900
Training Start Date:	5/08/08	No. to Retain:	13
Date Training must be Completed:	1/06/09	Range of Hours:	8 - 60
Type of Trainee:	Retrainee	Weighted Ave. Hours:	50

SACRAMENTO CENTRAL OFFICE
1100 J Street, 4th Floor
SACRAMENTO, CA 95814
(916) 327-5640

N. HOLLYWOOD REGIONAL OFFICE
4640 Lankershim Blvd., Suite 311
NORTH HOLLYWOOD, CA 91602
(818) 755-1313

S.F. BAY AREA REGIONAL OFFICE
1065 East Hillsdale Blvd, Suite 415
FOSTER CITY, CA 94404
(650) 655-6930

SAN DIEGO REGIONAL OFFICE
5353 Mission Center Road, Suite 110
SAN DIEGO, CA 92108
(619) 686-1920

www.etp.ca.gov
ETP (04/15/05)

The final review was conducted via telephone & E-mail communications on May 20 & 29, 2009.

FINAL REPORT SUMMARY:

• ***HISTORY OF AGREEMENT CHANGES***

The Agreement was executed on 4/18/08 and training began on 6/06/08. Your staff reported that all training was completed on 6/12/08, which allows for the 90-day retention period to be completed within the term ending date of the Agreement on 4/06/09.

• ***FINAL PROJECT STATISTICS***

Attendance rosters submitted by Budlong & Associates, Inc. show that only six (6) trainees (46%) of the 13 trainees to be retained have completed training and their 90-day retention period. Current ETP records show that Budlong & Associates, Inc. has earned and received payments totaling \$2,496 (15% of amount funded) for the retention of six trainees. You reported that because of the current economic situation the company could not spend employee's time and resources needed to provide more training to complete 100 percent of the trainees. You also indicated that there were no problems in implementing the training, and some difficulty you initially experienced reporting online was resolved after getting some guidance from ETP. You also reported that because of the training, Budlong & Associates is able to use your Revit software to competitively bid on upcoming projects.

PROJECT STATUS PROVIDED BY THE CONTRACTOR:

Job Number	Number to Retain	Number Enrolled in Training	Number of Trainees Dropped (following enrollment)	Number of Trainees Completed Minimum Hours	Number of Trainees Completed all Training	Number of Trainees Completed Retention
1	13	6	0	6	6	6
Totals :	13	6	0	6	6	6

The data submitted by you, as shown above, is in agreement with the data on the Contract Status Report.

ATTENDANCE ROSTERS:

The Analyst reviewed the attendance rosters of six (6) trainees billed for final payment on Invoice 3. The records reviewed validated this invoice for the training hours billed. The records confirmed that the Agreement curriculum was provided as specified and the ratio of trainer to trainee delineated in the Agreement plan was adhered to. It is your responsibility to ensure that all training records comply with panel requirements for auditing purposes. (Reference: Title 22 California Code of Regulations, Section 4442)

AUDIT:

Budlong & Associates, Inc. will be notified in writing if this agreement is selected for an audit that will be conducted either at your site (field audit) or by telephone if selected for a desk audit (or "review"). These notifications will be sent in advance to allow ample preparation time and will include a list of documentation that will be examined by the auditor. A list of the documentation typically examined during an audit will be included along with the Audit Notification and Audit Confirmation letters. To provide support of training, original training attendance documentation is required; photocopied records are not acceptable. Listed below are types of records typically requested during an ETP field audit:

- Training attendance records such as rosters, sign-in sheets, etc.
- Payroll records of individual trainees to verify wage and hours worked
- Personnel records regarding occupation and dates of employment
- Documentation of employer paid health benefits (if applicable)
- Cash receipts to verify receipt and accounting of ETP funds

RECORD RETENTION:

Records must be retained within your control and be available for review at your place of business within the State of California. This responsibility will terminate no sooner than four (4) years from the date of the termination of the Agreement or three (3) years from the date of the last payment by ETP to the Contractor, or the date of resolution of appeals, audits, claims, exceptions, or litigation, whichever is later.

Please contact your Monitoring Analyst within ten working days at (818) 755-1323 or gpelaez@etp.ca.gov if you have any questions or comments.

Sincerely,

Signature on file

Wally Aguilar, Manager
North Hollywood Regional Office

Signature on file

Gilberto Pelaez, Contract Analyst
North Hollywood Regional Office

cc: Kulbir Mayall, Manager, Fiscal and Certification
Master File
Project File

Date report mailed to Contractor 6/22/09